



Kent Tourism Perception Research Executive Summary

Prepared by Arkenford Ltd for Kent Tourism
July 2007

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Introduction

Kent Tourism commissioned research to look at the market for short breaks and day trips to Kent, and in particular the coastal product.

The research was designed to look at where people go for their day trips and short breaks, what they do, who they go with, how they get there and why they are motivated by these destinations.

The research also evaluated the awareness and perceptions of Kent, East Kent and many of the East Kent towns.

The aim of the research is to provide the East Kent Partnership with some framework and recommendations for changing or enhancing perceptions of destinations in order to encourage more visitors to the area and to establish a baseline to benchmark for the future.

Methodology

The research was conducted using an online self completion questionnaire.

The sample was obtained from an online panel, allowing respondents to be targeted by geography, age and gender. The respondents from the online panel were selected from the South East and the Home Counties. All of the respondents had to have taken at least one day trip or short break in the past 12 months.

A total of 1,466 completed interviews were achieved through the online panel.

In addition to the panel interviews Kent Tourism provided a list of contacts from their enquirer database. These contacts were e-mailed the same questionnaire as the panellists and incentivised with a prize draw. A total of 850 completed interviews were achieved through the Kent Tourism contacts.

This resulted in a very robust sample of 2,316.

The fieldwork lasted for two weeks and ended mid May 2007.

ArkLeisure

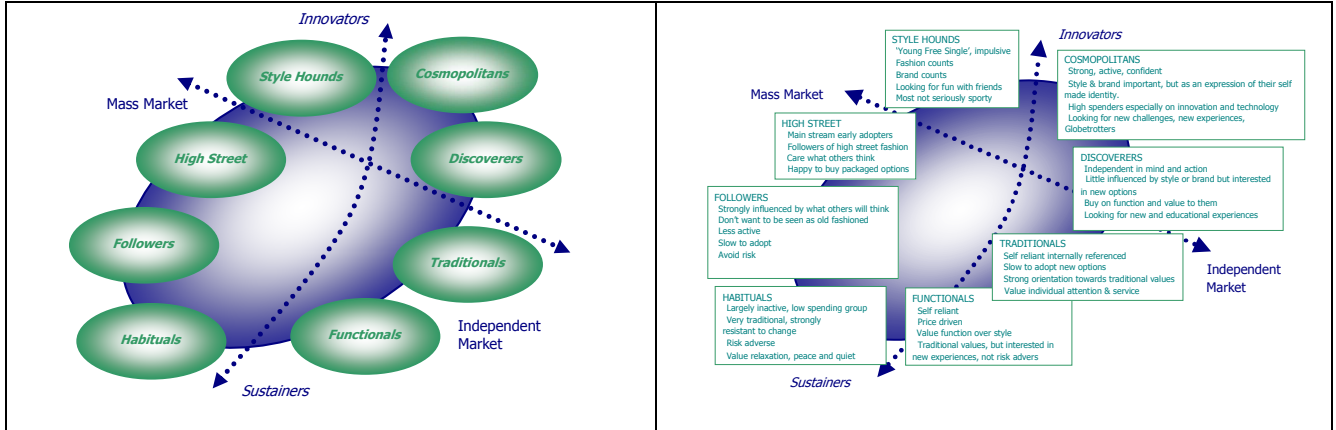
The ArkLeisure model is used in this analysis to highlight some of the factors affecting individual choices in this research.

ArkLeisure is a segmentation model specially designed for the leisure and tourism markets. Unlike segmentation models built around lifestyle data the ArkLeisure model looks at an individual's values and outlook to life, which means that it can effectively predict behaviour in a leisure context based on whatever segment an individual belongs to.

The segmentation has been, and is currently being used at all levels, for example at a **national** level (Tourist boards of England, Scotland and Wales), a **regional** level (e.g. Cumbria Tourist Board, Yorkshire Tourist Board, Tourism South East, North West Development Agency, East of England), for specific **destinations** (e.g. London, Manchester, Liverpool,

Birmingham, Brighton, Cambridge) and for specific **attractions** (e.g. Woburn Abbey and Safari Park, Leeds Castle, Madame Tussauds).

The following diagrams outline the segmentation model with some key elements that define each segment.



Day Trips

Within the South East sample the most popular day trip destinations were London and Brighton. Fewer than 8% went to Kent for their last day trip but the most popular destinations within Kent were Leeds Castle (8% of Kent visitors/ 0.7% of total), Whitstable (7% of Kent visitors/ 0.6% of total) and Dover (6% of Kent visitors/ 0.4% of total).

Ease of getting to a destination is the primary consideration for choosing a day trip destination, with 39% stating it is a major influence. 70% of last day trip was taken by car.

The destination will then be chosen on the specific attractions or sights to see (36% stating major influence) or a destination that is good for a specific activity that the respondent wants to do (37% stating major influence).

Generally when people go on a day trip somewhere they will take a walk around the area (42% undertaking activity), have something to eat (41% undertaking activity), maybe take in an attraction (37% visiting historic/ heritage attraction) and perhaps do some shopping (30% undertaking activity).

Few people are going on a day trip for physically active pursuits. Walking is the most popular activity but from past research this is most likely to be gentle walking around a town or attraction rather than a hike across the downs.

The younger age groups are more likely to be influenced by the man made product offering, and are more likely therefore to be choosing city locations.

Younger and more leading edge segments (Cosmopolitans and Style Hounds) are more likely to be influenced by the shopping, eating and entertainment options available.

Traditionals, Cosmopolitans and Functionals are into historical and cultural attractions.

Older age groups are more likely to be going to smaller town or rural locations.

Most people do not proactively seek out information for day trips but tend to rely on their own previous experience (45%) or recommendations from friends or family (39%). Just one in five people seek out information and the most common source is the internet search engine. The younger age groups and those of the left hand side of the ArkLeisure model tend to rely more on recommendations than other groups.

Short Breaks

3% of the sample went to Kent for their last short break.

Brighton, The Lakes, Cornwall, Wales & Yorkshire are popular short break destinations for this South East sample.

Kent destinations are seen more as day trip destinations rather than short break destinations.

Scenery becomes more important in the choice of a short break destination. People want to stay in a picturesque location and will make the effort to get there if it is worth going to. 35% of people stated scenery was a major influence in the choice of short break destination.

As with day trips, destinations are chosen based on the attractions or sights that they have (31% stating major influence) or because it is a good destination for specific activities that the respondent wants to do (31% stating major influence).

Short breaks to city locations tend to be shorter in duration than those to more rural destinations.

General exploration or visiting friends or family are the main reasons people go on a short break.

Whilst on a short break the most popular activities are eating out (50%), walking (47%), general exploration (46%), visiting historic attractions (42%) and shopping (38%).

Familiarity is important for the older age groups in terms of where they choose to go, while the younger market is happy to try new destinations.

Most people are not pro-active in seeking information for a short break destination. The majority are acting on recommendations (31%) or using their own knowledge gleaned from previous visits (26%).

As short breaks are more likely to be for the purpose of visiting friends or relatives compared to day trips then recommendations from their friends/ relatives play an important part in their decision making process.

The most common source of information is the internet search engine but this is only used by 18% of people for their last short break.

Kent

Kent is seen as a county that offers attractive countryside and history and heritage. It is not initially associated with its coastal product.

Not seen as a place to go for nightlife or adventure sports.

There are three destinations that have good awareness levels; Dover (73%), Canterbury (74%) and Margate (65%).

Other destinations fall away in terms of awareness and in particular the rural destinations. Hythe (32%), Dymchurch (30%) and Medway (30%) have the lowest awareness levels.

The bigger towns have better awareness levels than other areas. The rural destinations and brands have the lowest levels of awareness. The following table shows the awareness levels of Kent destinations with other competitive destinations in the South.

	Aware of	Suitable for short break	Suitable for day trip	Visited on a short break	Visited on a day trip
Coastal					
Brighton	91%	48%	55%	26%	45%
Dover	73%	22%	33%	9%	21%
Hastings	70%	28%	34%	9%	21%
Southend on Sea	68%	16%	40%	5%	26%
Eastbourne	66%	27%	30%	9%	15%
Margate	65%	20%	32%	6%	16%
Folkestone	59%	16%	26%	7%	14%
Ramsgate	54%	15%	24%	4%	10%
Whitstable	45%	15%	21%	5%	11%
Herne Bay	44%	13%	21%	3%	10%
Camber Sands	42%	18%	18%	6%	8%
Broadstairs	40%	14%	18%	4%	9%
Sandwich	36%	10%	16%	3%	6%
Deal	35%	10%	16%	3%	7%
Cromer	33%	18%	8%	7%	4%
Hythe	32%	9%	15%	4%	8%
Dymchurch	30%	9%	15%	3%	8%
Rural					
New Forest	68%	52%	21%	21%	13%
South Downs	43%	18%	22%	5%	14%
White Cliffs Country	42%	19%	18%	7%	12%
Heart of Kent	38%	17%	20%	7%	13%
Romney Marsh	35%	14%	15%	5%	9%
Kent Downs	29%	11%	14%	4%	9%
The Weald	24%	9%	11%	3%	7%
North Downs Way	20%	7%	11%	2%	6%
Natural East Kent	17%	7%	8%	3%	5%
The Blean	4%	1%	2%	1%	1%
Urban					
Oxford	80%	40%	44%	15%	29%
Cambridge	75%	36%	20%	12%	12%
Canterbury	74%	33%	39%	10%	22%
Tunbridge Wells	56%	13%	31%	5%	19%
Salisbury	56%	30%	20%	9%	11%
Winchester	56%	26%	24%	7%	13%
Maidstone	51%	9%	25%	5%	15%
Rochester	45%	10%	40%	3%	24%
Sevenoaks	44%	6%	23%	2%	14%
Chatham	39%	7%	24%	3%	16%
Medway	30%	5%	15%	2%	10%
Total	2316	2316	2316	2316	2316

East Kent

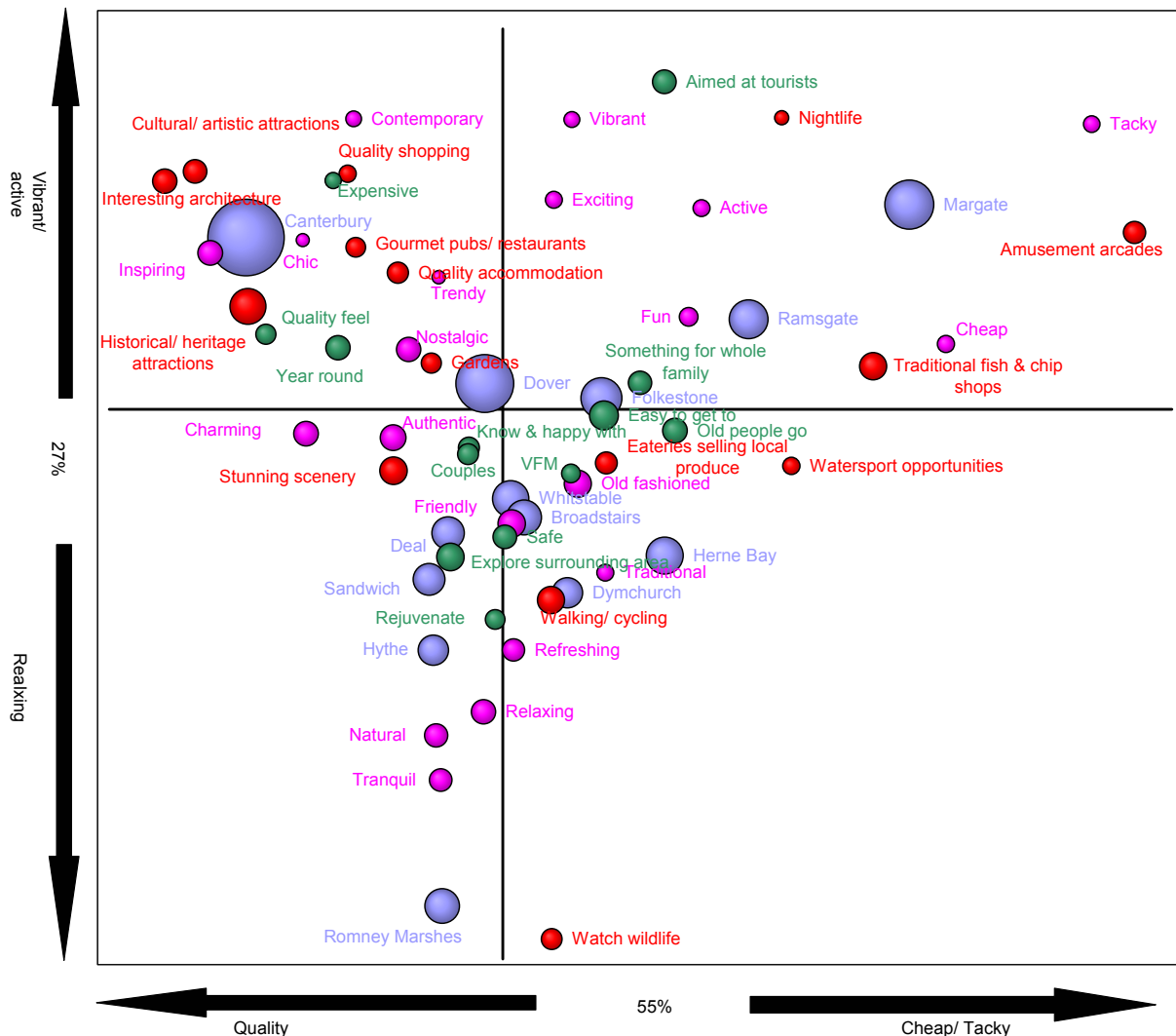
The perception of East Kent is being strongly influenced by the port of Dover, as the strongest perception relates to day trips to France and a gateway to Europe.

The coastal offering in terms of attractive scenery and seaside resorts is strongly associated with this part of the region.

All of the East Kent destinations are considered more as day trip destinations rather than short break destinations. Visiting levels are in line with awareness levels in terms of Canterbury, Dover and Margate being the places that more of the sample have visited compared to others.

The map below shows the perception of each of the East Kent destinations. The further away from the centre of the map the stronger the perception is of that destination along that particular axis. The closer an attribute is to a destination the more it is associated with that place.

- The blue bubbles represent the destinations.
- The red bubbles represent the product offering.
- The pink bubbles represent the emotional offering.
- The green bubbles represent rational factors.



In terms of perceptions there are three destinations that have strong images; Canterbury, Margate and Romney Marsh.

Canterbury (74% awareness) is seen as the flagship destination offering history, culture, quality shopping, eating and accommodation.

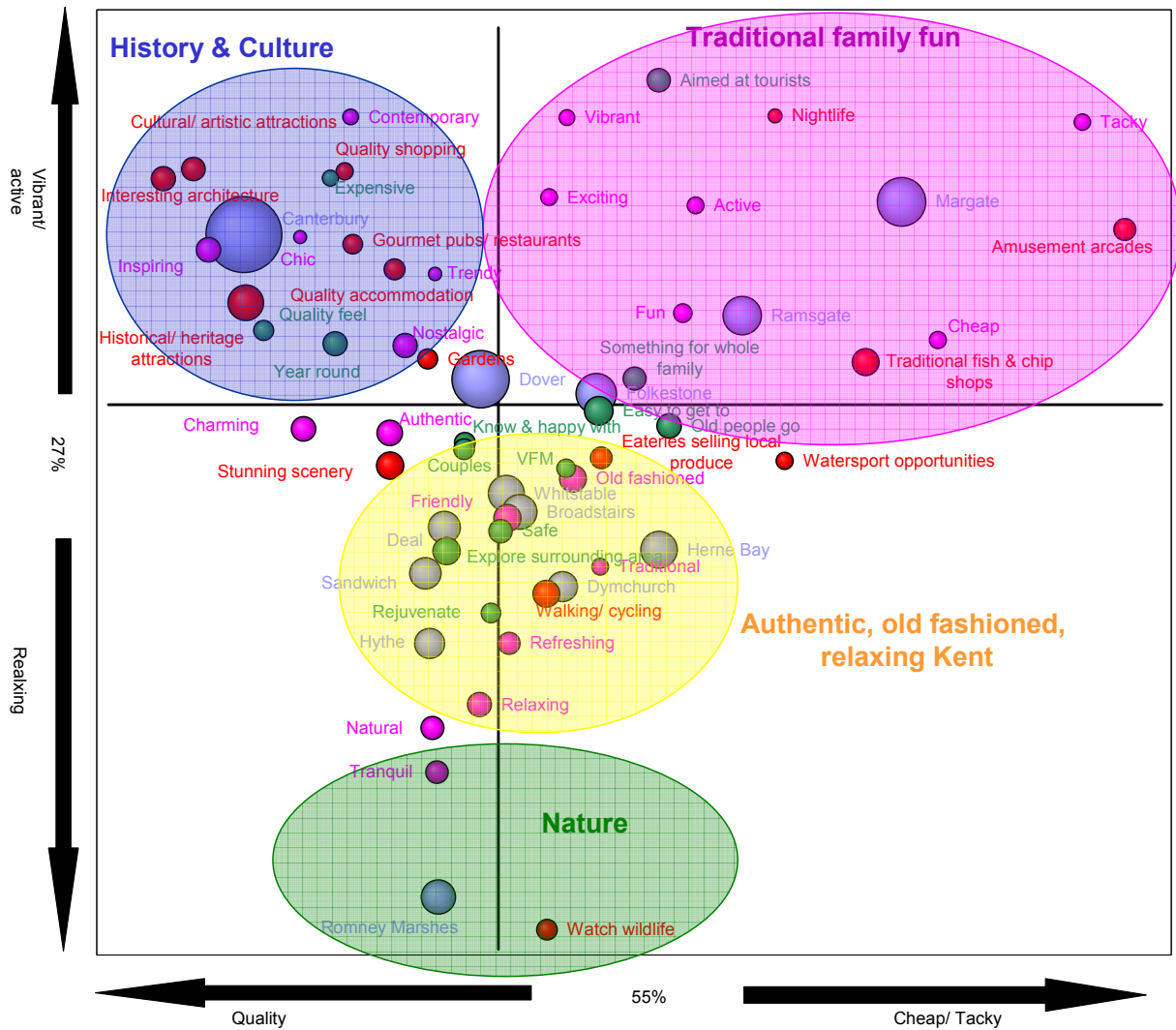
Margate (65% awareness) is seen as a traditional seaside resort with amusement arcades and fish and chip shops but is seen as old fashioned and tacky.

Romney Marsh (35% awareness) is seen as a natural destination to go to for walking, cycling or to watch wildlife in its natural environment.

Dover (73% awareness) and Folkestone (59% awareness) are well known but mainly as gateways to the continent. Dover has an association with history and scenery, most likely because people have heard of Dover Castle and the White Cliffs.

Many of the remaining East Kent destinations have a great deal of potential to create strong perceptions. The majority of respondents do not have strong views about what each of these destinations can offer. Some people have some perceptions of certain elements (e.g. history) but not have a definitive perception of the destinations. These destinations are seen as quite traditional, authentic towns in Kent with a relaxed feel and somewhere that is likely to attract the older age groups.

There are currently four themes that can be overlaid onto the market map. These can be classified as History & Culture, Traditional Family Fun, Nature, and Authentic, Old-fashioned & Relaxing Kent.



The East Kent destinations are currently attracting an older, independently minded person. They are not attracting the younger ages, Style Hounds, High Streets and Followers who prefer to have plenty of activities and attractions laid on for them but importantly for these segments they need to be told about these places. If the Style Hounds and High Streets read or hear that a specific destination offers what they are looking for then they are likely to make a visit and later the Followers will visit, as they want to be like the Style Hounds and High Streets but do not want to take too many risks.

Brighton is a key competitive destination, as it is attracting a large proportion of day trip and short break visitors, especially from London.

It is seen as a destination that is easy to get to, for Londoners this probably means by train, with frequent and express trains travelling between the two destinations. It is attracting a younger market compared to Kent and is seen as a destination that offers something for everyone and good nightlife.

Brighton offers normal high street shopping as well as unique shopping in the Lanes. It offers traditional family fun with the beach and the pier (with its fun fair) and offers many types of eating establishment. Given that it has a reputation for shopping and nightlife it is attracting the Style Hounds and given that the left hand side of the ArkLeisure model act heavily on recommendations that reputation will spread through word of mouth.

Themed Breaks

Themed breaks are appealing as something to do that is unique or different. It is the sort of experience that would be done to celebrate a special occasion and not something that would be done as part of course to learn something new.

The idea of a themed break appeals to the 25-44 year age group.

With the exception of the luxury/ pampering theme the other themes lend themselves towards day trips rather than short breaks. This is likely to be a result of wanting to try something unique and if the person does not like the experience then they have not wasted too much time.

Luxury/ pampering is the most popular theme. This is largely driven by the accommodation and dining and lends itself to a short break. Cosmopolitans and Style Hounds find this theme particularly appealing.

Discovery/ Education is popular with the Cosmopolitans and Traditionals and these segments indicate that it should be built around history and heritage.

The third most popular theme is an environmental/ green theme. This mainly appeals to the Cosmopolitan segment and should be based on walking and local produce dining.

These themes need to be built around something unique that people would find difficult or time consuming to arrange themselves. It also needs to be something that the masses cannot do otherwise it wouldn't be a unique experience.